



CALIFORNIA STATE PARKS FOUNDATION

Introduction

The California State Parks Foundation is seeking a consulting firm or a team of firms to support its multi-channel membership program and direct marketing major donor and planned giving programs.

Who We Are

With 130,000 members, California State Parks Foundation (CSPF) is the only statewide independent nonprofit organization dedicated to protecting, enhancing and advocating for California's magnificent state parks. Since 1969, CSPF has raised more than \$223 million to benefit state parks. CSPF is committed to improving the quality of life for all Californians by expanding access to the natural beauty, rich culture and history, and recreational and educational opportunities offered by California's 280 state parks.

What We Do

The California State Parks Foundation works to protect California's most precious places: its 280 state parks. Since our founding, we have worked to help enhance state parks through advocacy, educational programs, capital projects, competitive grants and fundraising. We accomplish our mission by building a diverse membership community of passionate park supporters, raising funds to support and protect state parks and to develop programs that serve the public, advocating for adequate funding and sound stewardship policies for parks, mobilizing volunteers to work on behalf of parks, and facilitating educational programs, habitat restoration, land acquisition and capital improvements.

In order to support state parks, CSPF focuses on four main areas of work:

- **Advocacy:** We serve as the independent voice for state parks by advocating for adequate funding and sound policies for state parks, including deferred maintenance support, and funding educational programs, habitat restoration and land acquisition.
- **Programs:** We cultivate stewardship of state parks by hosting and funding a range of volunteer and educational programs aimed to support state parks.
- **Grant giving:** We give direct support to state parks by offering a series of competitive grants to state park units, qualified nonprofits, government entities, and partners of state parks. These grants support discretionary projects as well as operating expenses in some parks, and they help keep state parks open, accessible, safe, clean and enjoyable for all visitors.
- **Capital Improvements:** We work to ensure that state parks in significant need of repair or restoration, particularly when it has historical significance, are taken care of.

CSPF has an annual operating budget of about \$10 million, with 28 employees, governed by a state-wide board of 36 Trustees and 8 Advisory Trustees.

Where We Are Located

CSPF headquarters is in San Francisco, with offices in Sacramento and Los Angeles where, respectively, our Government Affairs and Program departments are located. The firm chosen will work with staff in San Francisco. The Development Department is led by the VP, Development, and is comprised of two teams: Major and Planned Gifts; and Membership. The Director of Membership will be the primary contact for the new firm and will facilitate planning and production between the new firm and the fundraising, communications, and database management staff.

Fundraising Environment

CSPF has enjoyed steady, robust expansion of membership, growing from approximately 60,000 members in 2004 to over 130,000 members today. The fundraising program encompasses direct mail, telemarketing, and a sophisticated use of online channels. This is supplemented by a strong web presence as well as personal cultivation of major donors.

For two years, the high-value donor pool (mostly \$1,000 and up) has been managed separately from the bulk of the donor base, with success in upgrade and expansion of the major donor pool. CSPF has increased its planned giving marketing as well, creating a third major strand of direct marketing.

Also during the past few years, we have seen steady growth in online giving, in response to both social media vehicles and traditional mail solicitations.

Despite great core strengths of our overall fundraising program, CSPF for the first time in a decade encountered a drop in its revenues in the second half of 2012, due to two external events. One was diminishment of the threat of closures to state parks, thanks in part to legislative successes driven by CSPF. Second, and more damaging, was the revelation by the Department of Parks and Recreation of over \$50 million in funds that were previously undisclosed, causing a breach in public and legislative confidence in the management of the department. Immediately, CSPF experienced a rapid drop in contributions.

Since then the 2012 crisis has slipped from the headlines but has not been entirely forgotten. However, thoughtful, consistent information and messaging by CSPF, has resulted in improved response rates. Nevertheless, being closely identified with a government department will continue to present challenges. Our membership benefits are strongly associated with the DPR park pass program, which is changing and becoming more costly to CSPF. We can expect that the volatility of the past six years to continue, requiring nimble responses in order to sustain and increase CSPF membership and contributed revenue.

To view CSPF's present membership levels and benefits go to www.calparks.org/membership

SEVERAL YEARS OF MEMBERSHIP DATA MAY BE FOUND IN THE ATTACHED APPENDIX

Four graphs are included in the appendix to provide an overview of CSPF fundraising, its scope and results over the past 6-8 years. Included for the low-dollar program are the 12- and 24-month value of donors, donors and gifts by fiscal year, and gross fundraising results. For the major

donor program (\$1,000 and up), gross fundraising results for four years by channel are shown in the fourth chart. Additional information is available upon request.

Future Fundraising Opportunities

We are confident that CSPF will continue to play a central role as Californians' "voice for parks." We are poised to build on the many strengths of our fundraising programs. In particular, we foresee significant opportunities in online acquisition, solicitation, and stewardship.

Request for Proposal

CSPF seeks a partner firm, or a team of firms, to help evaluate our areas of greatest potential growth and to devise fundraising strategies, write copy, design artwork, and analyze campaign results for the major strands of direct marketing for low-dollar, major donor, and legacy donors, using mail, online, and other media. We want services that optimize long-term, sustainable revenue throughout the donor lifecycle, including acquisition, retention and renewal, cultivation, and stewardship.

We are open to a joint proposal by more than one firm, provided that the CSPF experience is one of seamless coordination with the ease of working with a single firm. (Please note that CSPF will not accept proposals from firms for narrow aspects of the scope of work.)

Also highly desired is a firm that will handle billing for all subcontractors.

Application Process

Interested firms should submit a proposal that includes the following:

- Proposal Narrative (no more than five pages)
- Price Bid
- Team Qualifications
- Client References
- Examples of sample materials to include:
 - Direct mail acquisition, renewal, upgrade, and cultivation packages
 - Planning giving solicitations and cultivation packages
 - Email solicitations if applicable
 - Sample analytic reports

The proposal narrative should address the following questions:

- 1) How can we continue to build our low-dollar file (\$.01-\$999), Major Donor (\$1,000-\$9,999), and legacy donors in a challenging environment through:
 - Acquisition
 - Retention and Renewal
 - Cultivation
- 1a) How would these strategies differ when we are in a strong year?
- 2) What approaches would you recommend for CSPF with regards to creative, messaging, and segmentation?

- 3) How can we upgrade donors to both our mid-level (\$100-\$999), high-dollar (\$1,000-\$9,999), and monthly giving programs?
- 4) Would you approach the high-dollar group differently from the low-dollar donors, and if so, what would distinguish them?
- 5) Please share a lesson learned, or case study, on integrating on and offline fundraising efforts.
- 6) How does your firm manage production? What quality control measures do you have in place? How do you ensure that your clients are getting the best bang for their buck with regards to printing, mailing, and postage?
- 7) Are you able to handle all subcontractor billing?
- 8) Who in your firm analyzes the results? What reporting tools do you use and how often do you use them?
- 9) Describe some creative segmentation strategies you have recommended based on factors other than HPC/MRC. How have you used external data like modeling scores, donor “intelligence” from surveys, etc.?
- 10) What types of communication strategies have you developed/used to address various segments of a donor base (e.g. age groups, cross-channel donors)?
- 11) What makes you uniquely qualified to manage CSPF’s multi-faceted program? Please provide examples of how your firm is currently succeeding at managing low-dollar, high-dollar, monthly, and legacy giving programs.

Timeline

Release of RFP:	June 3, 2014
Proposals due to CSPF:	June 24, 2013
Selection of finalists:	July 1, 2013
Finalist presentations:	July 9, 2014
Selection of agency:	Week of July 14, 2014
Begin work:	August 1, 2014

Submission Deadline

Please submit four copies of your proposal to Jerry Emory by the close of business June 24th. Submissions are required in the following formats:

- One full copy of the proposal and exhibits in digital form.
- Four hard copies of the proposal and exhibits.

Contact Information

Proposals should be submitted to:

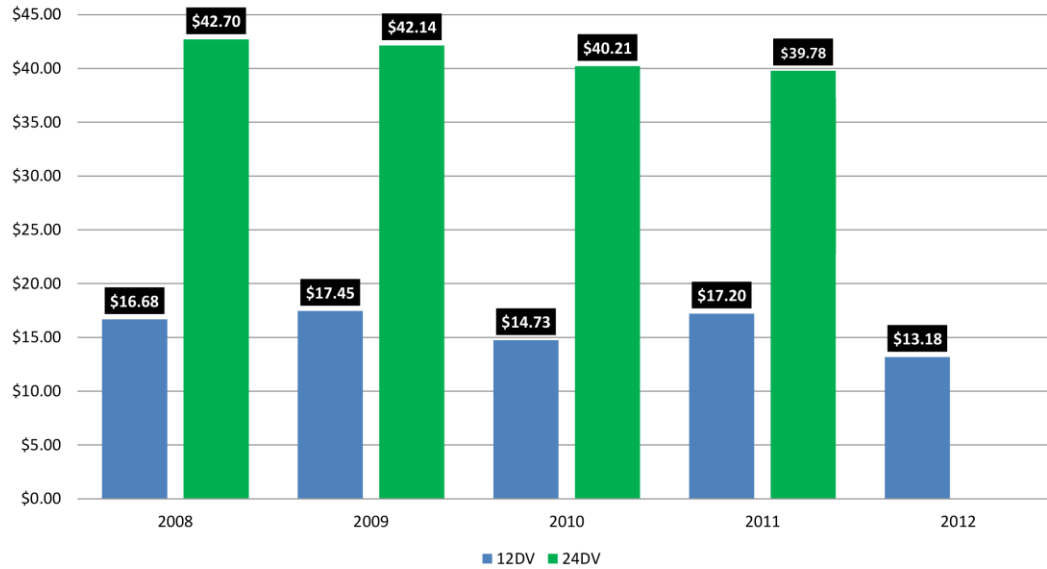
Jerry Emory
Director of Communications
California State Parks Foundation
50 Francisco Street, Suite 110
San Francisco, CA 94133
jerry@calparks.org

If you have any questions, please contact Jerry Emory at the above email (preferred) or at (415) 262-4414.

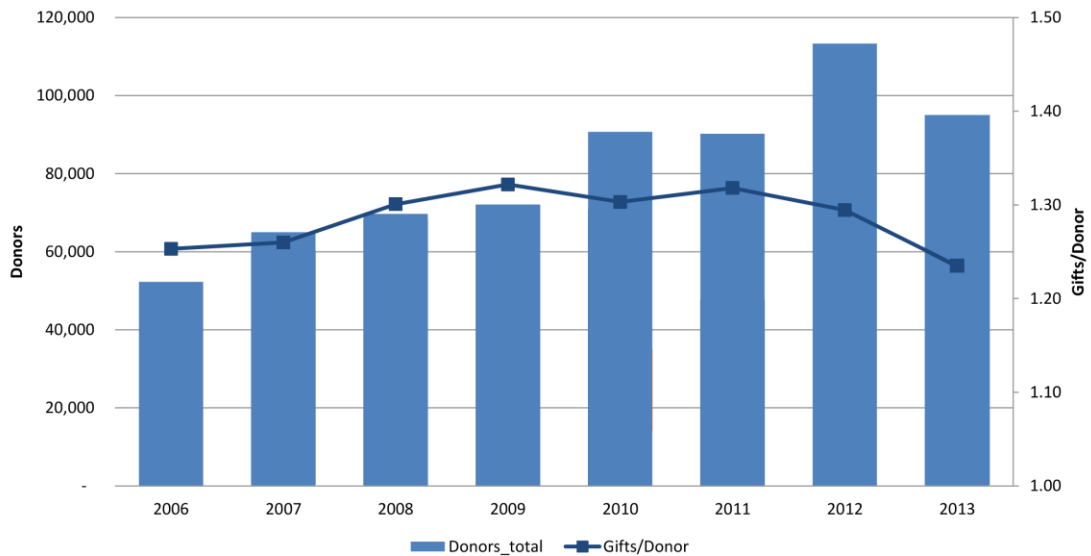
APPENDIX

LOW DOLLAR PROGRAM OVERVIEW:

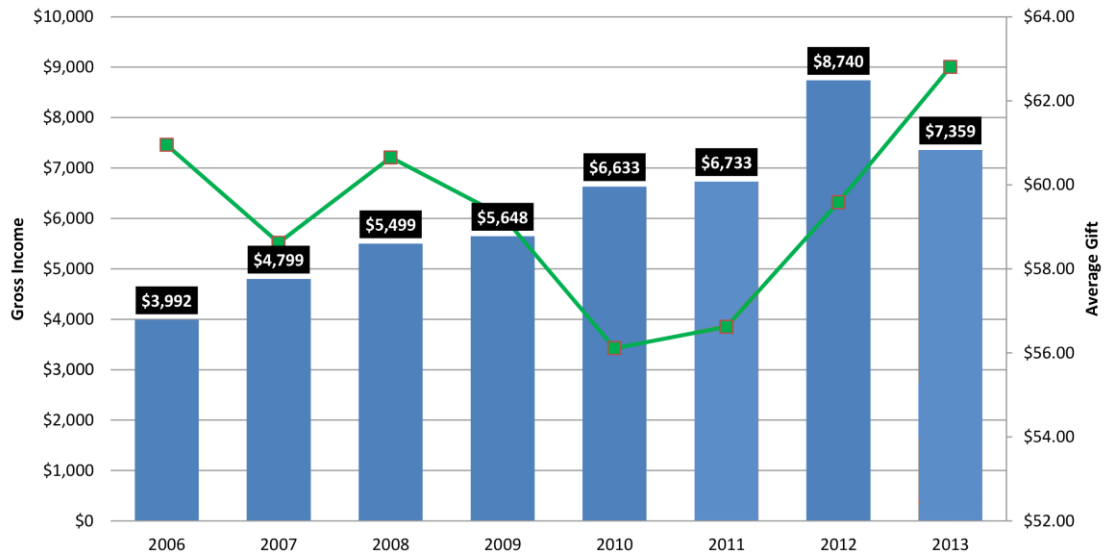
12 and 24 Month Value of New Donors



Donors and Gifts/donor by FY



Gross income by FY (in thousands)



MAJOR DONOR PROGRAM OVERVIEW:

